Fulfillment Webinar

Work Orders & Fines/Fees

I’d like to discuss Fines/Fees and Work Orders related to a damaged item that a patron brings in. This demonstration pertains to procedures in place here at CSUF, so the workflows might not be exact to your specifications. However, the use of departments/desks/work orders should still hold true. In my example I’m going to specifically speak to having the ‘patron damage’ work order be at the Circulation Desk to eliminate the need to place items in transit and lessen the amount of clicks needed. Having the work order tied to the desk also allows you to scan the item in immediately and choose which status within the work order you would like. You can just as easily have a department made that just deals with patron damages and have only a few staff operators added to this work order if you wish. Be careful about creating too many departments, as you’re ‘Currently at’ dropdown could get crowded if you’re scoped to work in a lot of different departments.

First I’m going to show you how I created a Work Order Type that would allow for processing a damaged item. You’ll want to go to Administration > General Configuration > Work Order Type. You’ll want to describe the work first before creating/adding the work order to the department/desk. For Code I will put **PatronDam** and Name it **Patron Damage** to show that this is a work order specifically for patron damaged items. I will unclick the ‘Recalls Loan’, because you will always have this item in hand when the patron returns it. Click ‘Add and Close’ and you will have your Work Order Type.

Next we will want to manage the individual statuses of the item within the Work Order Type. Click on ‘Actions’ to the right of the Work Order to manage the different statuses that you might have that describe the damage. For this example of a work order, I will add a few statuses that might be used to describe what is being done with a damaged item like Evaluate Damage, Paying one-time charges, paying for replacement and withdrawing the item. There is no order to how these statuses can be acted upon.

The next thing you’ll want to do is add this work order to either a desk or department. I’m choosing to add the work order to the default circulation desk. To do that you’ll want to go to Fulfillment > Configuration Menu > ‘You are configuring’ Main Library > Circulation Desks > Actions > Edit > Work Order Types > Add work Order. By configuring the work order to the desk, all operators who work the desk can manage the work order. If you decide to create a new department specifically for managing patron damaged material, you’ll have to remember to add all of the operators who might manage the work order. By configuring at the desk level you will save a whole lot of time in transiting items back and forth to departments/desks. If you manage it at a different department the staff working the desk can only put the item into the main Work Order Type and the staff who manages the Work Order will have to Scan In the item while being signed into the correct department. You’ll also want to add a work order time of something that is reasonable in evaluating damage. We usually say the patron will hear back from us within 7 days.

In our example a patron comes to the desk with a book that has many pages ripped out of it. You let the patron know that they might need to pay a fee and that they will be contacted by a staff member who evaluates damage. At this point you have a couple of options in setting this item in the work order that you want. My preference would be to use the **Scan In Items** functionality so that the item shows up in the **Manage In Process Items** area and it is immediately clear to the staff working in Alma what the status of the item is. In Primo, the work order will show up to the patron as In Process and the title of the Work Order Type, which in this case is Patron Damage. In Alma, it will show as the Process type of Patron Damage (Evaluate). If you scan the item in directly to the status, however, you don’t have the opportunity to write any notes with the work order, but instead will have to add it in the Manage In Process Items tab by going to Actions > Edit > Notes.

Another option is to pull up the patron’s record and show all loans that are active on the patron’s account (Loan Display > All). You can click on the Actions button next to the damaged item to set the item to the Process Type that you’d like (Patron Damage) and to place a note with the work order and choose the Managing Department (In this case Circulation Desk). This will not check the item in off of the patron record but will put it in the Patron Damage Request/Process type (There are Circulation desks I’ve worked at that prefer to keep the item checked out to the patron while it’s being assessed). Once the book is on the staff member’s desk who deals with damaged material, they can then go to the Fulfillment tab > Resource Requests > Scan in Items in order to change the item to the appropriate status type, Evaluate in this case. This will place the item in the Evaluate Workflow Step Status and allow you to find it under the Manage In Process Items link under Fulfillment.

In my example you can set the item to **Item Charge** for items that can be placed back into the collection after some mending. If the item is going to need to be withdrawn from the collection, than you can choose the **Replacement Charge** work order status. After the patron pays for the replacement of the item, the status can be changed to **Withdraw** so that it can be collected in a set to withdraw from the collection or reorder. This status does not actually withdraw the item, and only puts it into a status to be worked on at a later date.

After deciding what it is you want to do with the item; charge a small damage fee or replace the item entirely, you would need to create a fine on the patron’s record. To add this fee/fine, go to the patron’s record and click on the **active balance link** that is located in the top left of the Patron Services window. There you will see the option to **Add Fine or Fee**. You have many options to choose from when deciding what type of Fee Type to add, however, the choices cannot be edited. From the dropdown menu, choose Damaged Item Fine and charge the appropriate fee. For us, the fee will be for the mending/repair of the torn pages. You will also want to scan the Item Barcode so that the damaged fee is also linked to the item. Write any comment that you choose that will be visible to the patron and the staff at the desk. In order to collect money from your desk, you will need to make sure that your desk has the boxes checked in the Payment Information section. Fulfillment Configuration (choose main circ desk) > Circulation Desks > (Default Circ Desk) > Actions > Edit > Payment Information.

To modify the fine behavior where you can change whether a fine is Waivable, can be manually created or refundable go to Administration > User Configuration > Patron Charges > Fine Fees Behavior. To schedule the emails that would go out for Fines/Fees go to Fulfillment > Fulfillment Configuration Menu > Fulfillment Jobs Configuration > Fines/Fees Notification Job.